

IN THE CLAIMS:

1 1. (Currently Amended) A financial services outsourcing method for facilitating out-
2 sourcing of tax return preparation services for numerous clients on behalf of a plural di-
3 rect service ~~providers-provider~~ serving the numerous clients, the financial services being
4 outsourced to a given outsourcing group, the clients comprising a first set of clients in a
5 first country, having tax return filing obligations for the first country, and comprising a
6 second set of clients in a second country having tax return filing obligations for the sec-
7 ond country, the method comprising:

8 for ~~the plural respective direct service providers-provider~~, loading, onto a remotely
9 accessible part of a ~~common~~ host server, client specific financial files and corresponding
10 reference materials, the host server providing access to a remote computer client of in-
11 formation concerning the client specific financial files and corresponding reference mate-
12 rials;

13 preparing tax returns for the clients of the direct service ~~providers-provider~~ by
14 outsourced personnel, the outsourced personnel located outside the first and second coun-
15 tries;

16 providing the outsourced personnel with limited screen shot access to the host
17 server connected; the outsourced personnel preparing the tax returns through a remote
18 limited access client located outside the first and second countries, wherein the direct ser-
19 vice provider has control of the host server and the client specific financial files and cor-
20 responding reference material loaded thereon connected to the host server; and,

21 monitoring and reporting a status of the tax returns preparation.

1 2. (Original) The method according to claim 1, wherein the tax return preparation ser-
2 vices comprise individual tax return preparation services.

1 3. (Original) The method according to claim 1, wherein the tax returns are outsourced
2 through an intermediary firm to the outsourced personnel.

- 1 4. (Previously Presented) The method according to claim 3, further comprising the inter-
2 mediary firm interacting with the outsourced personnel through use of a servicing com-
3 puter system, and interacting with the plural direct service providers through use of the
4 servicing computer system.
- 1 5. (Original) The method according to claim 3, wherein the direct service providers com-
2 prise accounting firms.
- 1 6. (Cancelled).
- 1 7. (Currently Amended) The method according to claim 61, wherein the host server com-
2 prises a CITRIX server.
- 1 8. (Cancelled).
- 1 9. (Cancelled).
- 1 10. (Original) The method according to claim 1, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.
- 1 11. (Original) The method according to claim 2, wherein the host server comprises an
2 ASP server running tax software for use by plural independent direct service providers
3 provided with access to the ASP server.
- 1 12. (Original) The method according to claim 1, wherein the corresponding reference ma-
2 terials comprise image files of physical reference materials.

- 1 13. (Original) The method according to claim 1, wherein the client specific financial files
2 and corresponding reference materials comprise tax filer specific tax file and image files.
- 1 14. (Original) The method according to claim 13, further comprising loading onto the
2 remotely accessible part of the host server tax preparation software.
- 1 15. (Original) The method according to claim 1, wherein the outsourced personnel pre-
2 pare tax returns while located in India.
- 1 16. (Currently Amended) The method according to claim 1, further comprising ~~a~~the
2 ~~given~~ direct service provider interviewing a tax filer and obtaining supporting documen-
3 tation for the tax filer's tax return.
- 1 17. (Original) The method according claim 16, wherein the direct service provider com-
2 prises an accounting firm.
- 1 18. (Original) The method according to claim 16, wherein the supporting documentation
2 comprises the last season tax return as filed, receipt, and summary information regarding
3 finances of the tax filer.
- 1 19. (Currently Amended) The method according to claim 18, further comprising the
2 ~~given~~ direct service provider setting up a tax file compatible with a given tax software
3 package, and rendering the supporting documentation electronic.
- 1 20. (Original) The method according to claim 19, wherein rendering the supporting docu-
2 mentation electronic comprises scanning supporting documents into image files.